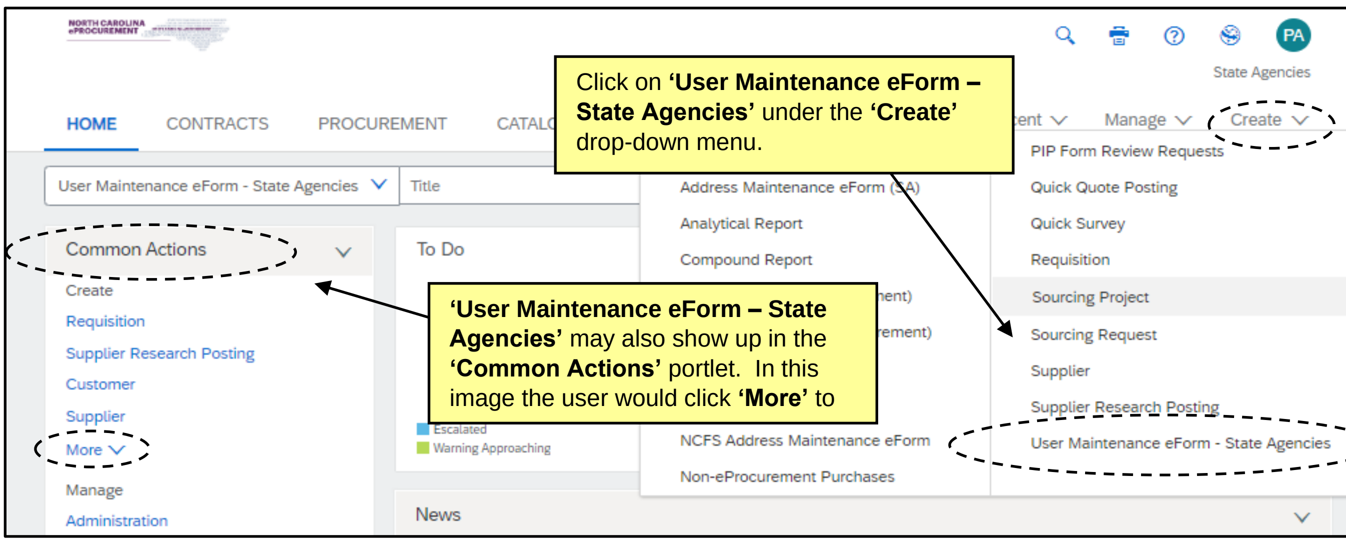
NC eProcurement
User Maintenance

System Administrators within each entity have the ability to directly update user and address information within NC eProcurement. To do so, System Administrators use electronic forms within the tool called eForms. These eForms are easy-to-use pages accessible from the **'Create'** shortcut menu. System Administrators are defined by users belonging to the **'NC User Maintenance eForm'** group. This process guide will show System Administrators how to conduct User Maintenance eForms for the Sourcing/Contracts modules.

I. User Maintenance

1. User Maintenance can only be accessed and completed through the Expert View of NC eProcurement. There is no way to access the User Maintenance eForm through the Guided Buying View.

2. To access the User Maintenance eForm, select **'User Maintenance eForm – State Agencies'** from the **'Common Actions'** portlet or from the **'Create'** menu. This brings up the User Maintenance eForm page.



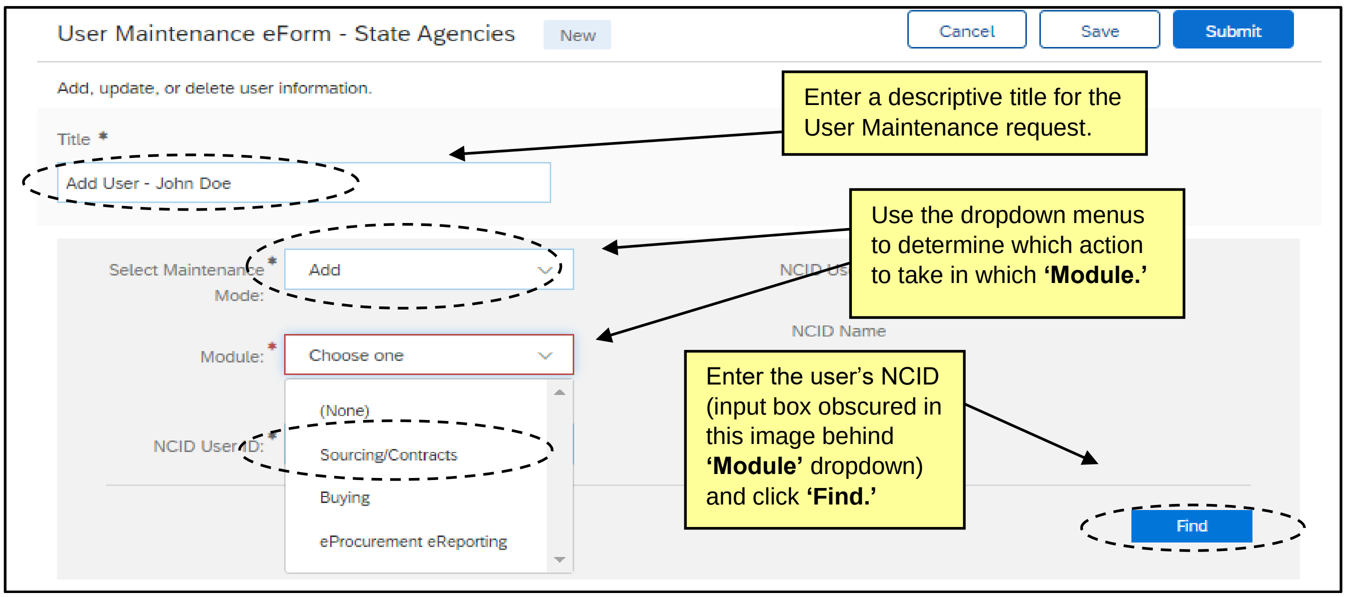
3. Begin by entering a title for the User Maintenance request (e.g., 'New Sourcing User – John Doe').

4. Next, select the action to take by choosing from the **'Select Maintenance Mode'** dropdown menu. Choices include **'Add,' 'Update,'** or **'Delete'** a user.

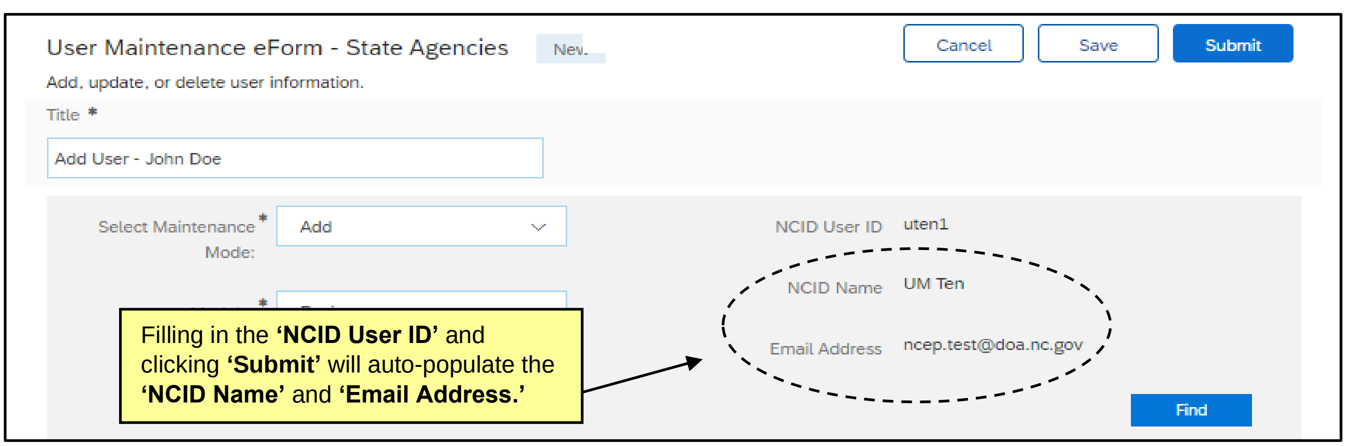
5. Next, select **'Sourcing/Contracts'** from the **'Module'** dropdown menu.

6. Enter the **'NCID User ID'** of the user for the action and click the blue **'Find'** button.

Notes:
- It may be necessary to click the **'Find'** button twice.
- Once a User Maintenance request is submitted, the NC eProcurement Help Desk will be notified, and they will review and approve the request before the changes are finalized in the system.
- Users must have an active NCID User ID set up before they can be added, updated, or deleted from NC eProcurement through the User Maintenance eForm.
- An error message of **'The NCID user does not exist'** indicates the user does not exist in NCID.
- If the NCID is associated to an Individual or Business account, the System Administrator will see an error message stating, **'Only a State or Local NCID account may be used with NCEP.'** NCID may be accessed by visiting https://ncid.nc.gov.



7. Entering a valid NCID will automatically populate the **'NCID Name'** and **'Email Address'** fields.



a. Adding a User

1. To add a new user to NC eProcurement, select **'Add'** on the **'Select Maintenance Mode'** dropdown on the **'User Maintenance eForm'** page and select **'Sourcing/Contracts'** from the **'Module'** dropdown.

2. Enter the NCID of the user for the action and click the blue **'Find'** button.

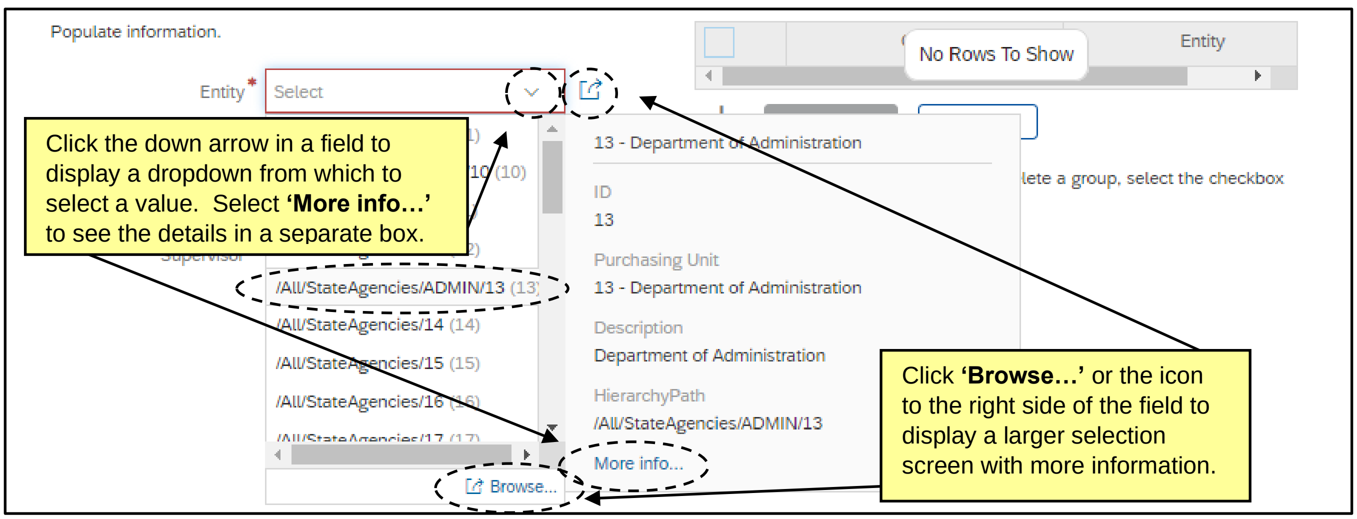
   Note: If the user already exists in NC eProcurement, an error message of "The specified user already exists in the system. Please use the Update operation to complete any modifications" will appear under the **'NCID User ID'** field.

3. After selecting a valid NCID, select the **'Entity'** for the new user's profile.

   Notes:
   - The dropdown arrow can be clicked to open a menu that will display the first 30 entities as well as a message at the bottom of the list that states **'Your search results exceed the limit. Change the search criteria to narrow your results.'**

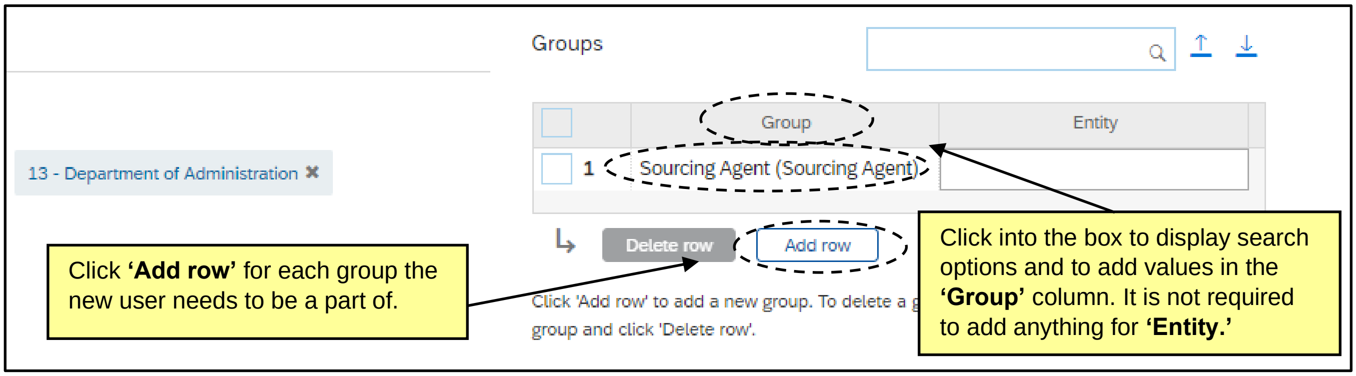
   - Hovering over a selection from the dropdown will display more information in a box to the right. Clicking on **'More info…'** at the bottom of that box will display the information in a separate box.

   - Selecting **'Browse…'** at the bottom of the dropdown (or the icon to the right side of the field) will display a larger selection screen with more information.



4. Select the appropriate **'Groups'** to which the new user should belong. Some groups are universal (i.e., Sourcing Agent or Contract Manager) while others are entity-specific and are preceded by an entity abbreviation (i.e., ADMN IT Security). Groups are used to determine the permissions and capabilities a user has to take certain actions in the system. Users can be added to multiple groups. See **Section II User Maintenance Group Definitions** for a list of groups and their descriptions.

   Notes:
   - It is not required to assign a value in the neighboring **'Entity'** column after selecting a value in the **'Group'** column for actions taken in the **'Sourcing/Contracts'** Module.
   - Click **'Add row'** to add a new group, then click into the box to display search options.

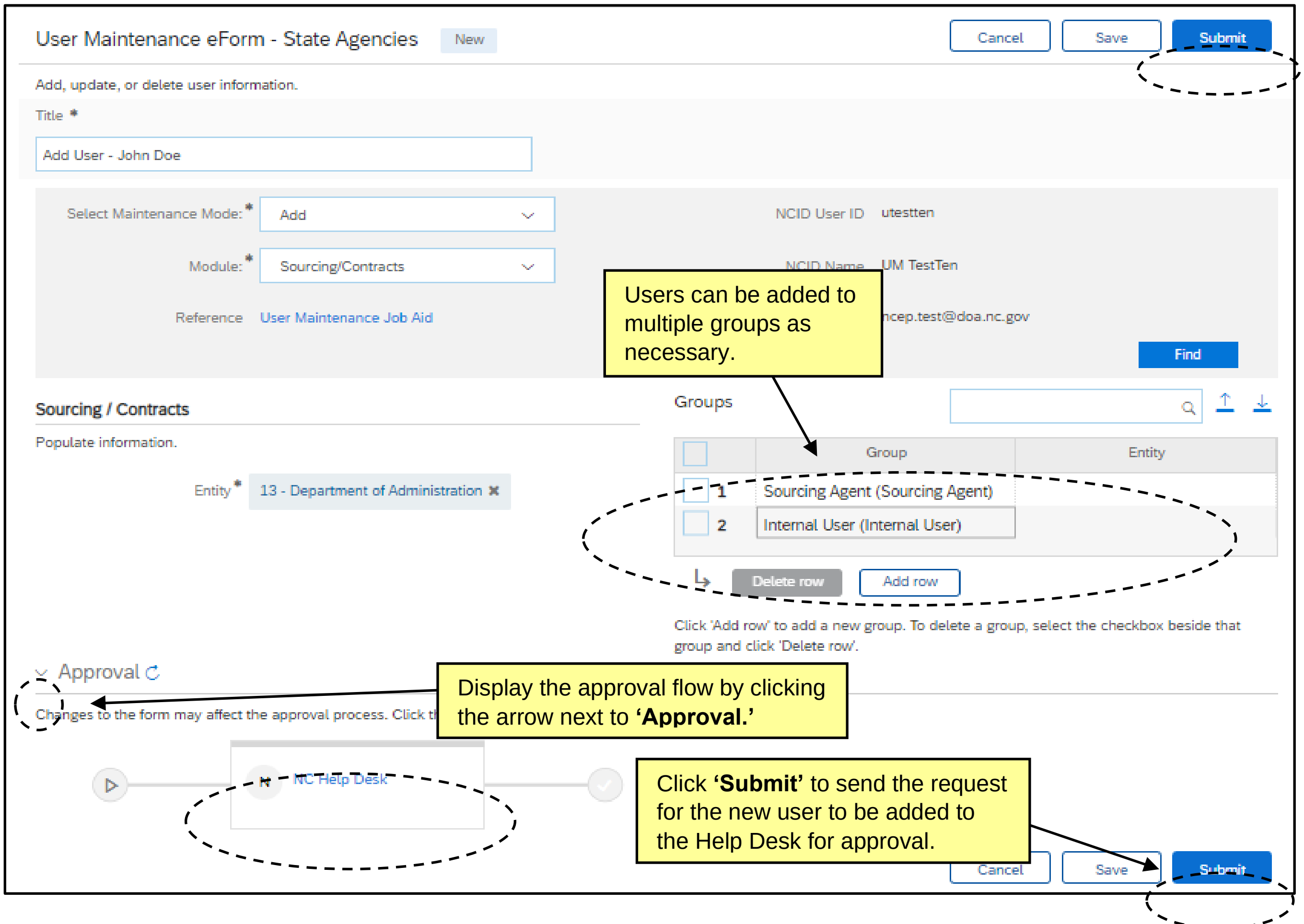


5. Once all required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'**) for review and approval.

   Note: Users in DHHS entities will see a **'DHHS eForm Approver'** group before the Help Desk approver.

6. Click **'Submit'** to request the creation of the new user.

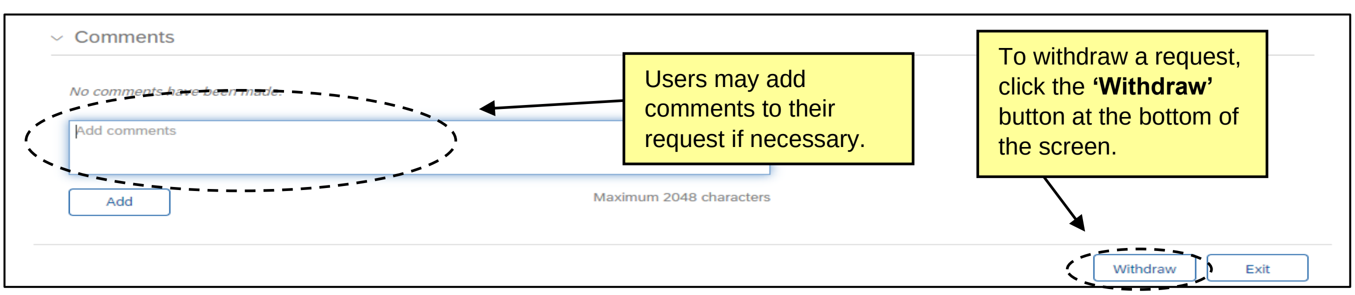
   Note: At any time when creating a User Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **'Save'** button at the bottom of the screen.



7. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

8. Click **'Proceed'** to view the request or find it in the **'My Documents'** portlet in **'Submitted'** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

   The Help Desk will either approve the request, which adds the new user to the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



b. Updating a User

1. To update an existing user in NC eProcurement, select **'Update'** in the **'Select Maintenance Mode'** dropdown on the **'User Maintenance eForm'** and select the **'Sourcing/Contracts'** Module.

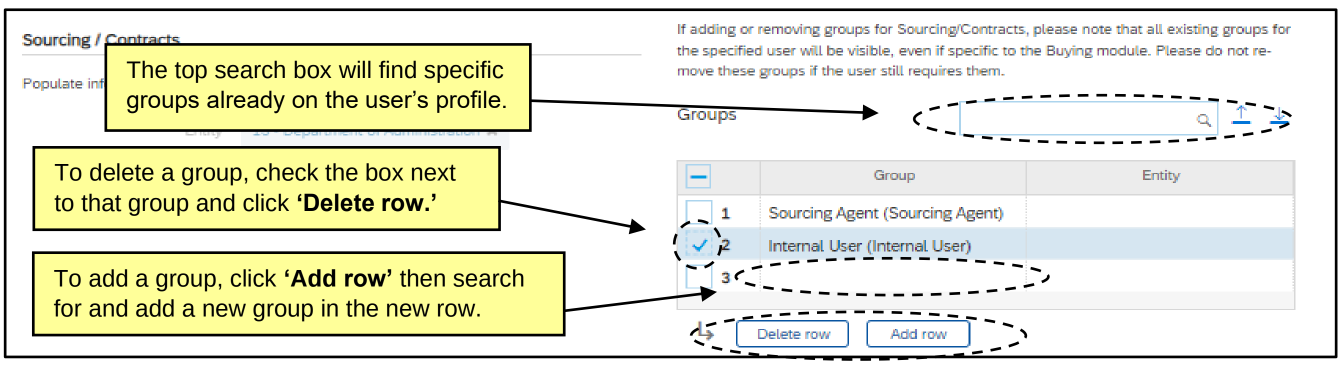
2. Enter the existing user's NCID in the **'NCID User ID'** field and click **'Find.'** It may be necessary to click **'Find'** twice.

   Note: If the NCID entered does not exist, the following error message will appear: "The specified user does not exist in the system. Please use the Add operation to add the user."

3. The existing user's current **'Entity'** and **'Groups'** will display. **'Entity'** will not be editable.

4. Make any desired changes to the user's **'Groups.'** To delete a group associated with an existing user, click the checkbox to the left of that group and click the **'Delete row'** button. To add a group to an existing user's profile, click **'Add row'** and select the desired group from the dropdown, then add the appropriate entity in the column to its right.

   Note: The search box above the **'Groups'** table searches for a specific group within the table below.



5. Once all the desired updates have been made, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'**).

   Note: Users in DHHS entities will see a **'DHHS eForm Approver'** group before the Help Desk approver.

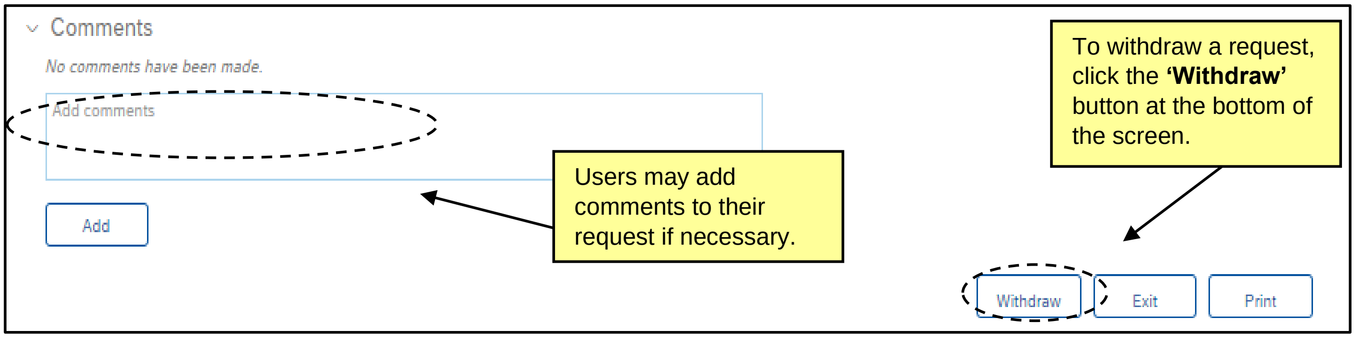
6. Click **'Submit'** to update the existing user's information in the system.

   Note: At any time when creating a User Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **'Save'** button at the bottom of the screen.

7. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

8. Click **'Proceed'** to view the request or find it in the **'My Documents'** portlet in **'Submitted'** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

   The Help Desk will either approve the request, which updates the user to the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



c. Deleting a User

1. To delete an existing user in NC eProcurement, select **'Delete'** in the **'Select Maintenance Mode'** dropdown on the **'User Maintenance eForm'** and select the **'Sourcing/Contracts'** Module.

   Note: Before deleting a user, be sure that a new Project/Workspace Owner has been assigned to active projects. See Creating a Sourcing Project or Creating a Contract Workspace for information on managing Team Members for Sourcing Projects or Contract Workspaces.

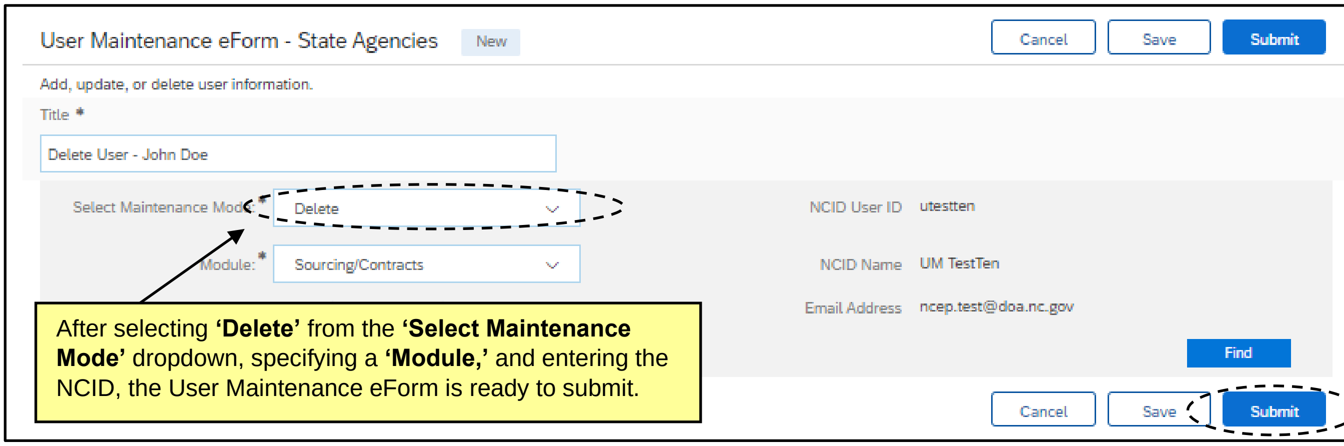
2. Enter the existing user's NCID in the **'NCID User ID'** field and click **'Find.'** It may be necessary to click **'Find'** twice.

   Notes:
   - If the NCID entered does not exist, the following error message will appear: "An unexpected error has occurred. Please contact the NC eProcurement Help Desk for additional assistance."
   - If the NCID has already been deactivated by NCDIT, the following error message will appear: "The NCID user has been deactivated." In this case, the user should follow through with deleting the profile.

3. Once the existing user's NCID and email address populate, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'**).

   Note: Users in DHHS entities will see a **'DHHS eForm Approver'** group before the Help Desk approver.

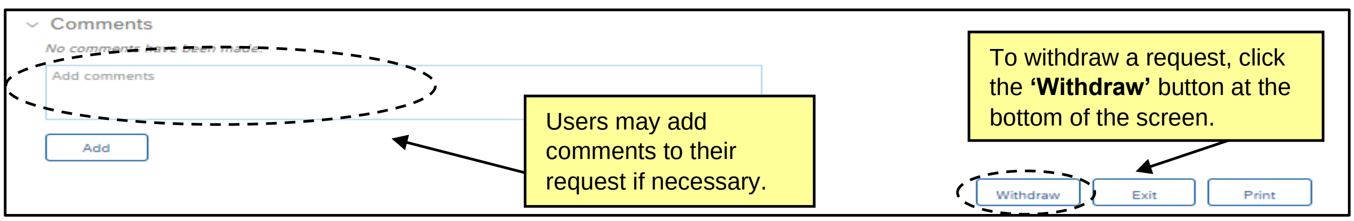
4. Click **'Submit'** to request that the Help Desk delete the existing user's information from the system.



5. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

6. Click **'Proceed'** to view the request or find it in the **'My Documents'** portlet in **'Submitted'** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

   The Help Desk will either approve the request, which removes the user from the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



II. User Maintenance Group Definitions

1. Each user has a unique profile with specific groups that they belong to, which informs what permissions and access that user has within NC eProcurement Sourcing/Contracts. The assigned groups are based on upon the individual's job functions and their responsibilities within their entity.

2. Groups determine a user's authority within the system. Each group has a set of permissions associated with it which determine what functionality and information a given user can access within NC eProcurement. Each user must belong to at least one group, however one group often has multiple permissions. Below is a list of available groups by module and the associated permissions in the group.

   Note: System Administrators will be able to see all available groups. If a System Administrator requests access to a group to which they should not belong, the request will be denied by the NC eProcurement Help Desk.

a. Groups for Sourcing

Group Name	Group Description
Sourcing Agent	• Creates, edits, and manages Sourcing Projects until completion • Edit and upload new documents
Internal User	• Search for and view Sourcing Projects

List of groups recommended for:

Profile	Groups recommended
Project Owner	Sourcing Agent Internal User
Approver	Internal User

b. Groups for Contracts

Group Name	Group Description
Contract Manager	• Create and owns a Contract Workspace through publication. • Edit documents on the Contract Workspace
Internal User	• Search for and view Contract Workspaces
Contract Administrator	• Delete a Contract Workspace

List of groups recommended for:

Profile	Groups recommended
Project Owner	Contract Manager Internal User
Reviewer	Internal User
Approver	Internal User
Observer	Internal User
System Administrator	Contract Manager Contract Administrator Full Reporting Access Authorized